Report Center

User Manual

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Chapter 1 - Introduction

The Report-Center is a report portal and Internet business intelligence center for enterprises, that provides a central access point for all reports, queries and documents from any information systems within the enterprise.

It offers a wide variety of production, analysis and information distribution options for enterprise employees, clients and suppliers.

Major services provided by the Report-Center

- Report, query and document input wizard for Web distribution.
- Organizational report tree manager by subjects.
- Individual and group user permission management.
- Advanced information filtering properties.
- Saves personalized reports by filtering and saving existing reports.
- Exports report data to various file formats (Excel, Word, PDF etc.)
- Sends reports by e-mail
- Periodic scheduling of report sending and receiving.
- Report load and queue management
- Fast print from Report Center server directly to enterprise printer
- Quick scrolling among report pages using caching mechanism
- Presents additional plates – different types of documents, links to others etc.

Chapter 2 - Logging into the System

2.1 Logging into the System

The Report Center is accessed via the PV4E application.

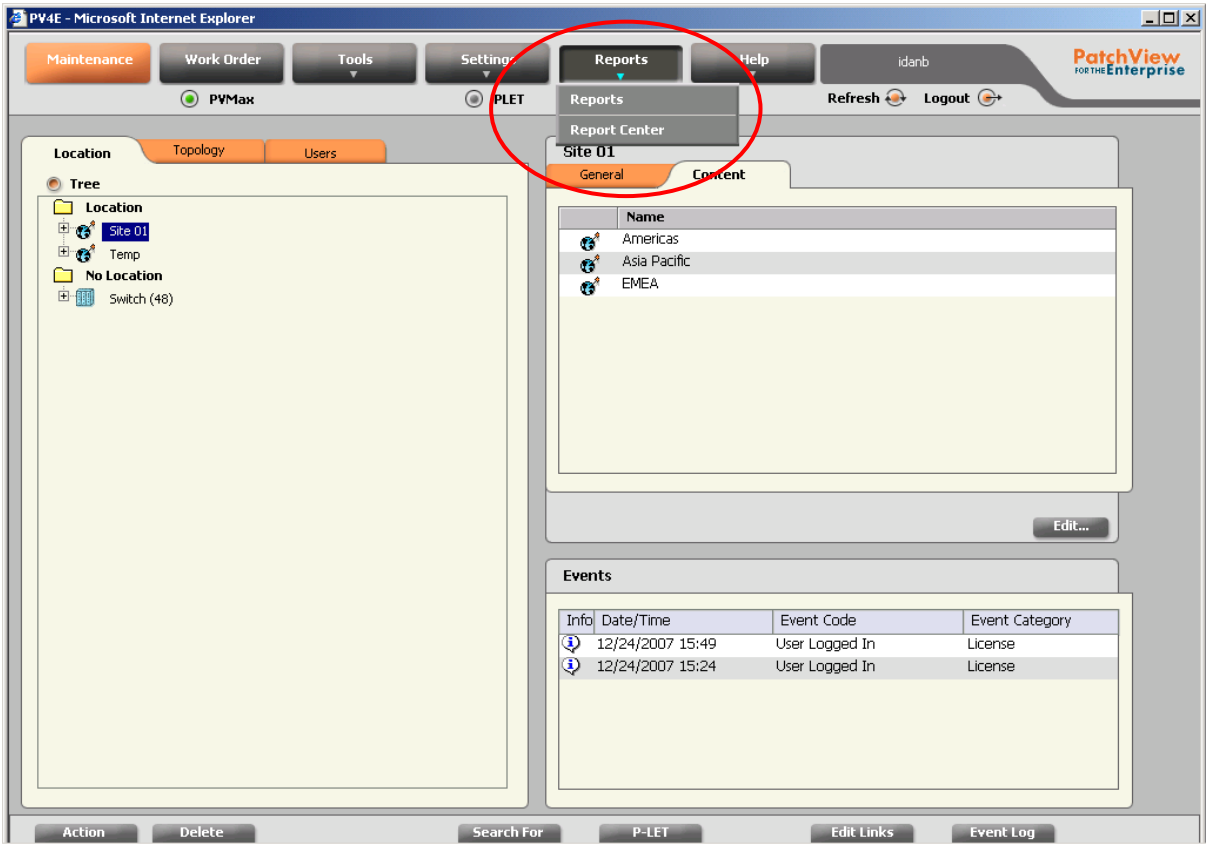


Figure 1 system login screen

To access the Report Center, click the *Reports* button on the main PV4E toolbar. From the drop-down menu select *Report Center*:

The following *Reports Center* screen opens.

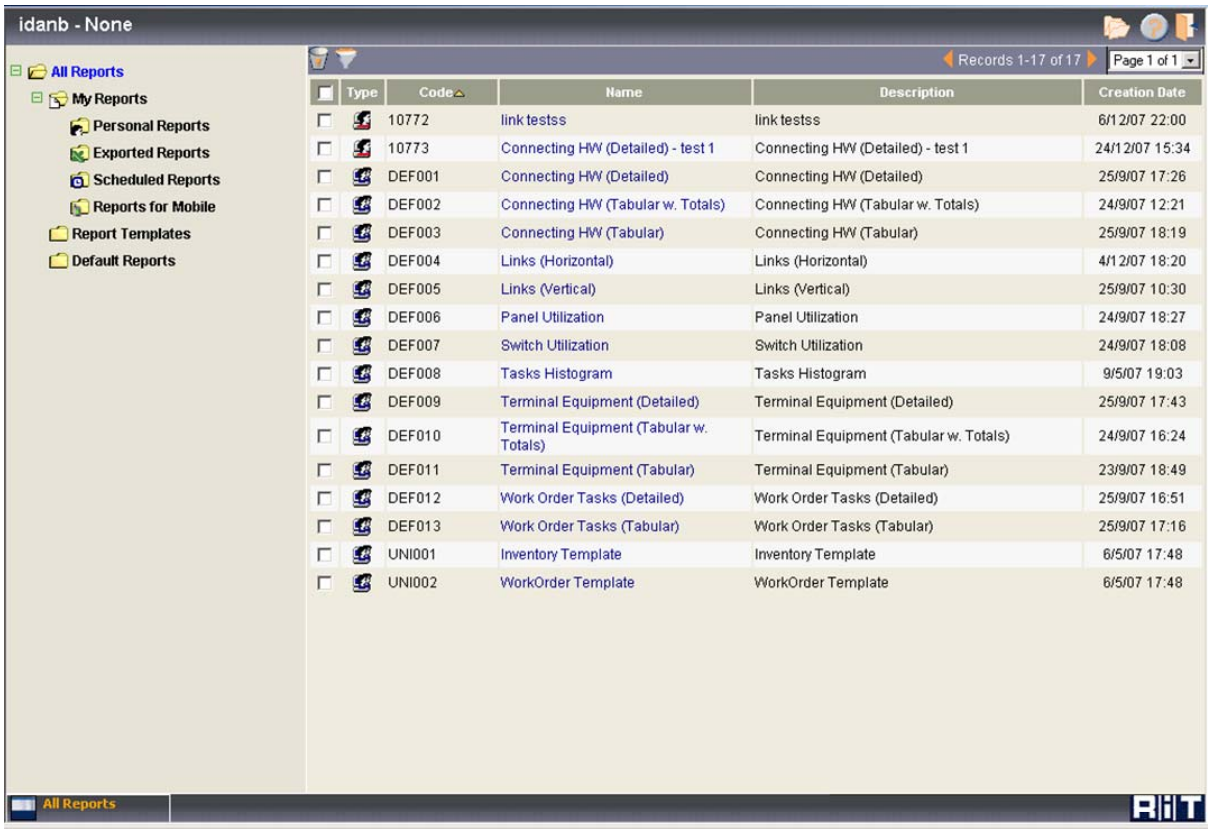

idanb - None
All Reports
My Reports
Personal Reports
Exported Reports
Scheduled Reports
Reports for Mobile
Report Templates
Default Reports
Records 1-17 of 17
Page 1 of 1
Type
Code
Name
Description
Creation Date
10772 link testss link testss 6/12/07 22:00
10773 Connecting HW (Detailed) - test 1 Connecting HW (Detailed) - test 1 24/12/07 15:34
DEF001 Connecting HW (Detailed) Connecting HW (Detailed) 25/9/07 17:26
DEF002 Connecting HW (Tabular w. Totals) Connecting HW (Tabular w. Totals) 24/9/07 12:21
DEF003 Connecting HW (Tabular) Connecting HW (Tabular) 25/9/07 18:19
DEF004 Links (Horizontal) Links (Horizontal) 4/12/07 18:20
DEF005 Links (Vertical) Links (Vertical) 25/9/07 10:30
DEF006 Panel Utilization Panel Utilization 24/9/07 18:27
DEF007 Switch Utilization Switch Utilization 24/9/07 18:08
DEF008 Tasks Histogram Tasks Histogram 9/5/07 19:03
DEF009 Terminal Equipment (Detailed) Terminal Equipment (Detailed) 25/9/07 17:43
DEF010 Terminal Equipment (Tabular w. Totals) Terminal Equipment (Tabular w. Totals) 24/9/07 16:24
DEF011 Terminal Equipment (Tabular) Terminal Equipment (Tabular) 23/9/07 18:49
DEF012 Work Order Tasks (Detailed) Work Order Tasks (Detailed) 25/9/07 16:51
DEF013 Work Order Tasks (Tabular) Work Order Tasks (Tabular) 25/9/07 17:16
UNI001 Inventory Template Inventory Template 6/5/07 17:48
UNI002 WorkOrder Template WorkOrder Template 6/5/07 17:48
All Reports
RiT

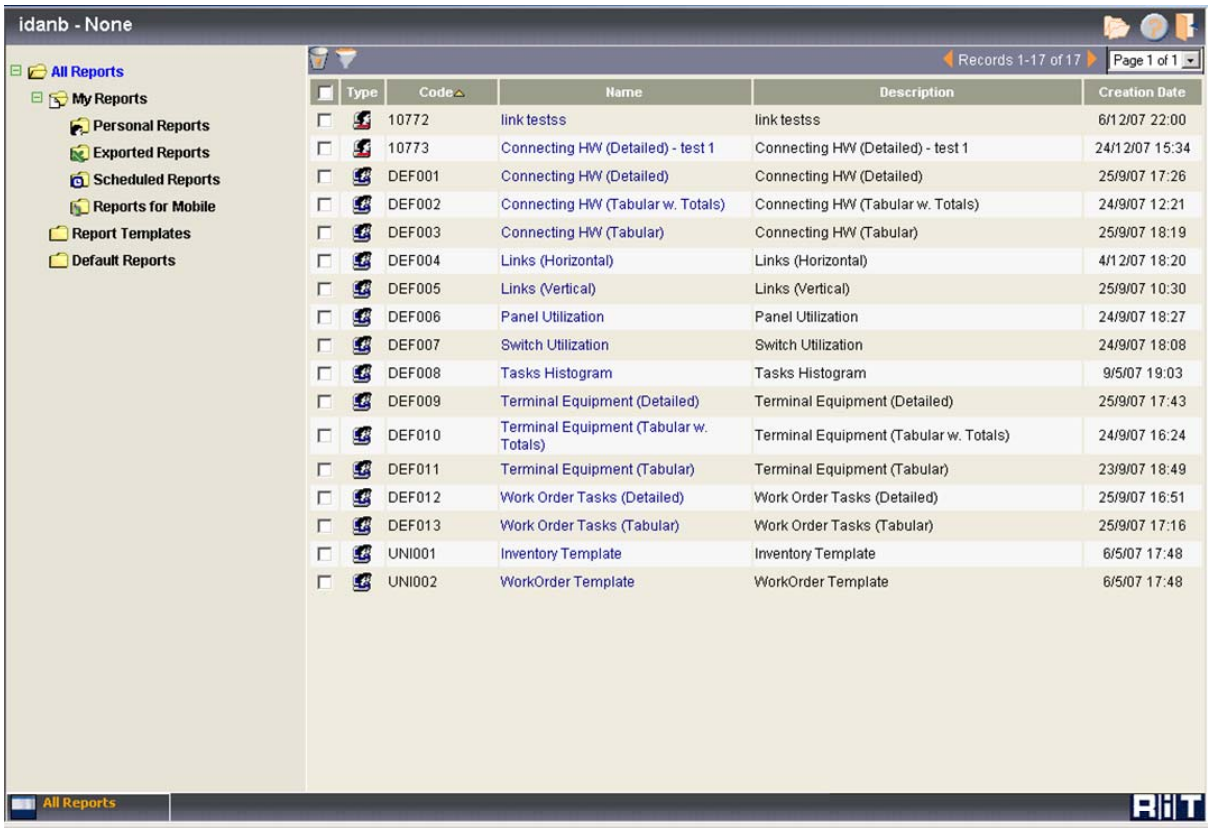
Figure 2 Report Center Main Screen

2.2 Error Report

If you receive a failure/error message warning of a particular failure in the system, contact your PV4E system administrator or a RiT representative.

Chapter 3 - Selecting an Existing Report

After logging into the system (*see Chapter 2*), the Report Center main screen is displayed:


idanb - None
All Reports
My Reports
Personal Reports
Exported Reports
Scheduled Reports
Reports for Mobile
Report Templates
Default Reports
Records 1-17 of 17
Page 1 of 1
Type
Code
Name
Description
Creation Date
10772 link testss link testss 6/12/07 22:00
10773 Connecting HW (Detailed) - test 1 Connecting HW (Detailed) - test 1 24/12/07 15:34
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DEF006 Panel Utilization Panel Utilization 24/9/07 18:27
DEF007 Switch Utilization Switch Utilization 24/9/07 18:08
DEF008 Tasks Histogram Tasks Histogram 9/5/07 19:03
DEF009 Terminal Equipment (Detailed) Terminal Equipment (Detailed) 25/9/07 17:43
DEF010 Terminal Equipment (Tabular w. Totals) Terminal Equipment (Tabular w. Totals) 24/9/07 16:24
DEF011 Terminal Equipment (Tabular) Terminal Equipment (Tabular) 23/9/07 18:49
DEF012 Work Order Tasks (Detailed) Work Order Tasks (Detailed) 25/9/07 16:51
DEF013 Work Order Tasks (Tabular) Work Order Tasks (Tabular) 25/9/07 17:16
UNI001 Inventory Template Inventory Template 6/5/07 17:48
UNI002 WorkOrder Template WorkOrder Template 6/5/07 17:48
All Reports
RiT

Figure 3 System Main Screen

General

The Report Center has a list of users permitted to enter the system and each user belongs to one user list only. The user name and name of the user group to which they belong is displayed on the upper right hand side of the screen.

The main screen displays system reports generated by the system manager and user reports generated by the user who can filter existing system reports and save them as new personal reports. Every Report Center system report belongs to a directory on the enterprise report tree and is filed there by the system manager. User reports are automatically filed in the Personal Reports directory under the *My Reports* sub-directory.

The system manager defines the following:

- Structure of enterprise report tree
- Types of system reports filed in every specific directory
- Types of directories each user may view

- Types of system reports each user is permitted to view

After you log into the system the main screen only displays the system reports you are permitted to view as well as all previously defined user reports.

3.2 Select Directory

On the right-hand side of the screen is a hierarchic tree of report directories. Click the directory name to display the reports files in this directory on the main screen as well as open the list of sub-directories within the present directory. Click the relevant directory icon to open and close the list of related sub-directories. To search for a particular report, select the directory in which it is filed. If you do not know the name of the directory, click the directory named All Reports (this is how Report Center opens after automatically logging into the system) to display a list of all reports in all directories.

The first sub-directory of the All Reports directory is called My Reports.

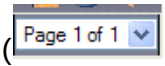
Figure 4 My Reports directory

Each user has their own *My Reports* directory that contains all their personal reports and monitors all activities carried out by the user on their reports, divided into the following sub-directories:

- **Personal Reports** – lists all user reports generated by user
- **Exported reports** – lists all export activities of reports made by the user or ordered by a user into a variety of file formats, including report number, name, export date and file format. You can download any file previously exported. The system manager can determine a maximum number of exported reports that each user can save.
- **Scheduled Reports** – lists all scheduling of repots previously defined by each user, including report number, name, scheduling date, scheduling frequency, last action taken and next action date. Scheduling date and addressees may be updated by clicking the *Report Name* field.
- **Reports for Mobile** – a detail of all reports saved as reports for viewing from a Cellular phone with the purpose of viewing them from the cellular phone.

3.3 Search and Activate Report

After selecting a directory, all reports linked to it are displayed on a table in the center of the screen. Table columns include the following information fields for each report:

- **Information item type** – information items in the report table may include the following types:
  - **System report** – report created by system manager ( )
  - **User report** – personal report generated by user ( )
  - **File / other** – link to another file or site ( )
- **Report number** – **system** reports are numbered by the system manager.
- **Report name** – **determined** by report generator
- **Report description** – **determined** by report generator
  - Click the name of any column in the report table to sort the table in ascending/ descending order according to the column.
  - A toolbar is located above the report table enabling additional search options:
- **Skip columns** – a combined box on the left of the toolbar shows the number of columns in the table and enables skipping from one column to the other (

).
- **Filter** – click the filter button ( ) to perform a search for a report according to a specific value in one of the table columns (report number/ name/ description).

  After you have located the required report, click on the name (highlighted in blue) to access.

3.4 Exit the System

Click the door icon ( ) on the upper right hand corner of the main screen and all other screens to exit the system and return to the system login screen.

Chapter 4 - Edit And Generate Existing Report Settings

After selecting a particular report on the Report Center (see *Chapter 3*), the report settings screen is displayed:

Figure 5 Report Settings Screen

4.1 Edit Report Settings

The report settings screen is divided into six major parts:

1. **Report details** – report number, report description, report name and ownership fields. The values of these fields are set when the report is generated and cannot be modified.
2. **Headers** – all headings on the generated report: header, main heading and two lower headings. These fields can be updated before generating the report.
3. **Sort fields** – list of fields that determine the order of report record sorting.
4. **Report Design** – the Dynamic Reports Center allows styling of the report – detailed in-depth in the Report Styling section.
5. **Filters** – list of fields that filter the original report population. These fields can be updated before generating the report.
6. **Generate report and perform advanced actions** – using the toolbar.

Fields that cannot be modified are set on a grey background.

Mandatory fields where you must enter a value are set on a yellow background.

4.2 Report Design

It is recommended that you use the inventory or Work Order template to design a report.

The report's initial settings are defined by the system administrator. Entering the design screen is possible only for a report that is defined as editable.

You can perform the following actions in the Report Design screen:

- Add new fields.
- Edit existing fields.
- Create complex functions.
- Edit and add notes.
- Change field location.
- Add vertical and horizontal lines.
- Add summaries to existing fields.

After clicking the Report Styling tool bar, the Dynamic Reports screen is displayed:

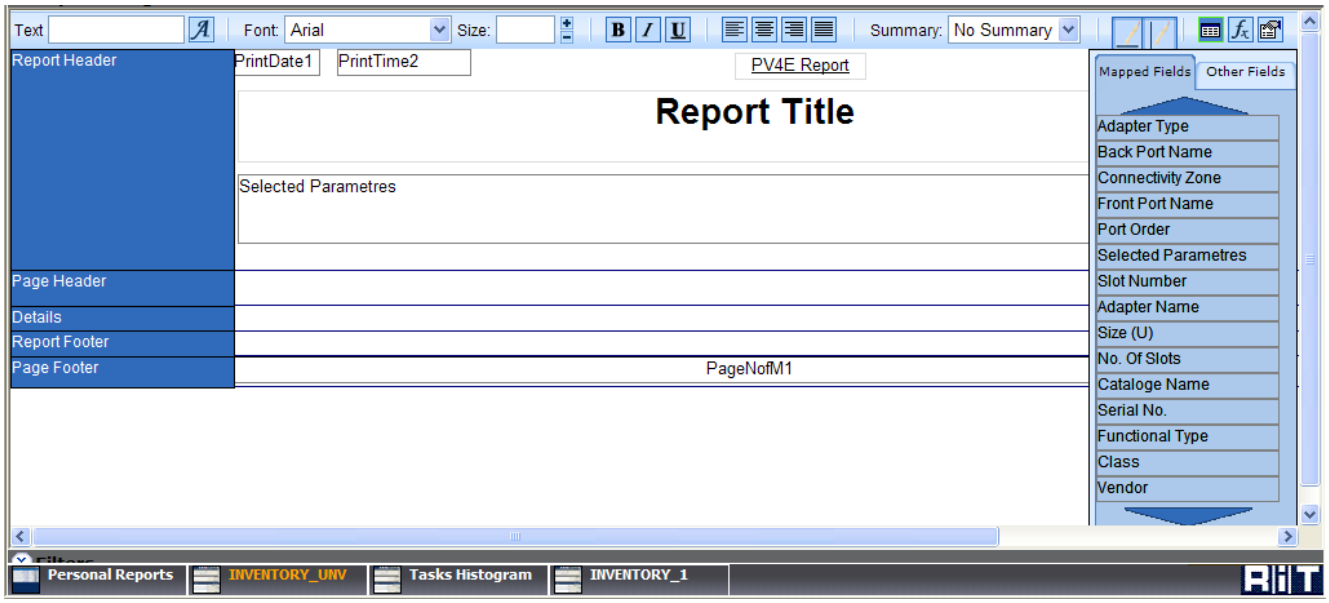


Figure 6 Dynamic Field Input

The Report Styling screen presents the report's structure and is divided into three main parts:

1. **The Tool Bar** – appears in the upper part of the screen. Shows all the tools available to the user in order to perform styling actions on the report.
2. **The Areas Tool Bar** – appears in the left part of the screen. Displays the sections in the report, such as: groups, data fields, data lines, etc.
3. **Data Display Area** – this area displays the fields, calculation fields and the summaries displayed in the report.

4.2.1 Report Fields

In the Field Design screen, there appears a details line and a groups line.

The Details Line – Presents the data in the report at the record level as it appears in the database.

The Groups Line – Presents a collection of data at the group field level.

For example in a *Customer Invoice Summary Report* there is no importance in viewing the comprise data for every invoice, but rather it is important to view the summary of invoices for each customer, and therefore a new group for the *Customer* field, presents a field summarizing all the invoices. The report shows a line presenting the sum of the invoices issued for each customer.

If you click the icon a pop-up window opens in the right-hand side of the data area. This window displays all of the fields available to be included in the report, and is comprised of two columns.

Mapped Field – displays the database fields. For more information about Mapped Fields, see Chapter 12 – Mapped Fields.

Formula Field – displays the calculation fields written by the person who created the report at the time of its creation. Each new calculation field that is written in the *Dynamic Reports* screen is displayed in this column.

The fields presented in the field list can be integrated into the report in the following ways:

- **Adding a field to a report** - In order to add a new field to a report from the list of fields available, click on the desired field using the left mouse button, and drag the field, while holding the mouse button, to the relevant location within the data area. Following the release of the mouse button, the field will be placed in the desired position.
- **Changing field location** - Click the desired field using the left mouse button, and drag the field, while holding the mouse button, to the relevant location within the data area. Upon releasing the mouse button, the field will be placed in the desired position.
- **Changing field width** - Point to the relevant field using the mouse. click the Shift button on the keyboard, and while holding the shift key down, drag the field to the left or right, to widen or narrow, accordingly.
- **Creating a new group** - Click the desired field using the left mouse button and drag, while holding, to the *Details* line in the *Areas* toolbar located in the left-hand side of the screen. After releasing the mouse button, a new group will be created in the report.

4.3 Creating and Editing Text Object

Creating new Text Objects – Type the desired wording in the Text Object writing window. After typing the desired wording, click the icon and drag it to the desired location within the data area. When the mouse button is released, the Text Object will be placed in the desired location.

Editing existing Text Objects – In order to edit a Text Object, make sure that the Text Object is focused. Click the *Text Object* using the left mouse button until its border is displayed as a dotted blue line. The content of the Text Object appears in the Text Object writing window.

The Text Object is now focused, and it is possible to perform one of the following editing actions:

- Enables you to select font type for the Text Object.

- Enables you to set the font size. If the font is made significantly larger, it is important to remember to increase the size of the text box in the data area accordingly.

- Enables you to accentuate the font in the Text Object .

- Enables you to italicize the font in the Text Object.

- Enables you to underline the font in the Text Object.

- Enables you to justify the wording to the right, the left or to the center, by clicking the appropriate icon.

Changing the wording – Retype the wording in the Text Object writing window.

4.4 Adding and Editing Summation Fields

The Dynamic Reports Field contains a list of built-in arithmetic functions that enable fast and easy summation of each numerical field.

The list of built-in arithmetic fields contains the following functions:

- **SUM** – adds up all of the values displayed in a selected field.
- **COUNT** – counts all of the values displayed in a selected field.
- **AVG** – calculates the average of all the values displayed in a selected field.
- **MIN** – displays the minimal value out of all the values displayed in a selected field.

Adding a summation field is performed according to the following steps:

1. In order to create a calculation field, drag the numeric field from the list of fields appearing on the right-hand side of the screen to the relevant place within the data area. For example, if the reference is to a calculation field for a group, the field must be placed in the bottom line of the group footer.
2. Click on the field using the left mouse button, so that it becomes bold.
3. Click the arrow adjacent to the summary window and select one of the functions appearing in the display list. The focused field will become a calculation field and is displayed, including the sum of all the column values according to the group to which it has been located.

Important: The calculation field displays a numerical calculation as per its location within the report.

- allows you to set the date and number fields within the report.

4.5 Graphic Design

– allows you to add a horizontal or vertical line. In order to add a line, click the appropriate icon and drag it to the data area while holding down the left mouse button. After releasing the button, the line will be displayed where chosen in the data area.

Extending or widening a line – point to the line with the mouse pointer, hold down the Shift key, and while holding down the left mouse button, drag the line to the right or down, accordingly.

In order to shorten or narrow a line – perform the same action, but the direction of the drag will now be to the left or up, accordingly.

4.5.1 Functions

The Dynamic Reports Center allows you to edit existing functions or to create new ones.

To view the editing window, click the icon. See the following screen:

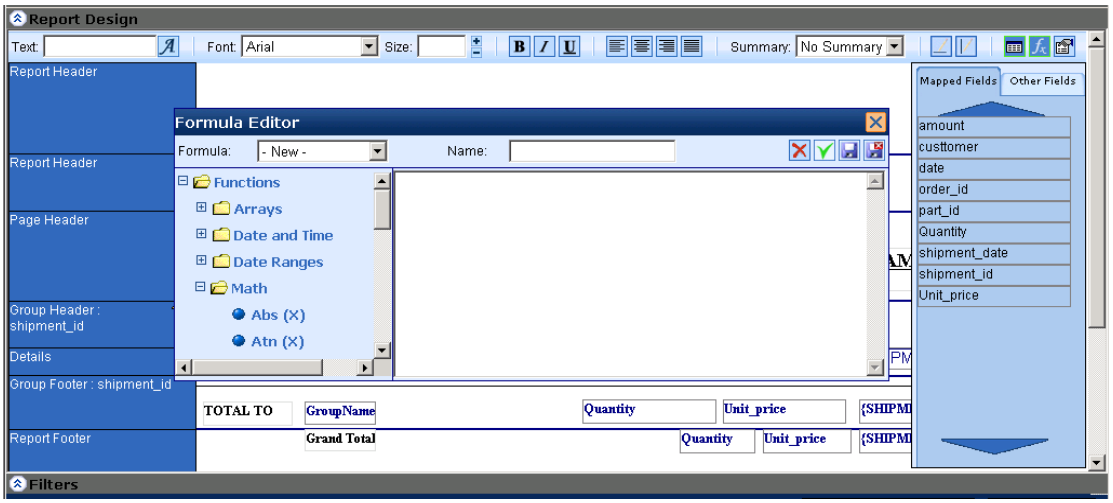


Figure 7 Function Creation Screen

The formula screen consists of three main parts:

1. **The toolbar** – located in the upper part of the screen and displays the tools available to you when handling the function (see arrow number 1 – *Fig 8*).
2. **The functions toolbar** – located in the left-hand side of the screen and shows a file tree that includes all of the functions available to you in order to write the function (see arrow number 2 - *Fig 8*).
3. **The editing area** – located in the center of the screen and is used to write the function code (see arrow number 3 - *Fig 8*).

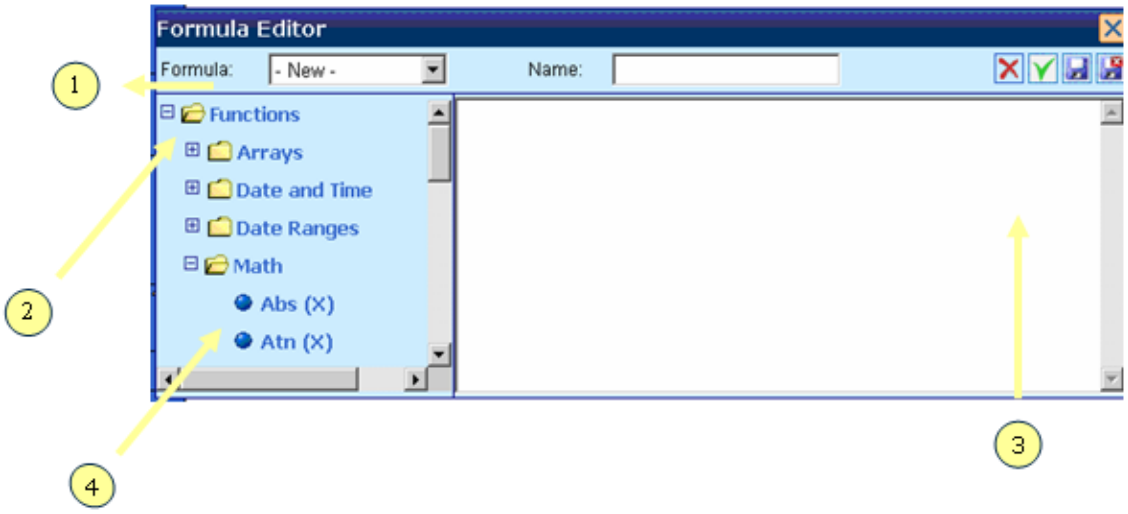


Figure 8 Function Creation Screen

To Edit an existing function – click the arrow in the formula menu in the toolbar (see arrow number 4 - *Fig 8*), and select the relevant function from the list of functions that appears. This list includes all the functions existing in the report.

After selecting the function, the function code is displayed in the editing area.

Create a new function – make sure that the formula window displays **NEW** (default setting). Type the name of the new function in the *Name* window. Now turn to the editing area and enter the code for the function.

When entering the function editing window, the following actions can be taken:

	Allows erasing existing functions
	Performs a syntax check for the function code entered, and displays a notice
	Saves the function
	Saves the function and closes the function editing window

The functions tree is organized by topics and is constructed in a hierarchal fashion. The tree is comprised of six primary folders, with each primary folder containing within it sub-folders grouping their relevant functions.

For example, all functions for performing mathematical operations are in the folder titled *Math*. These are used for the following operations:

- Abs – a function acting on a number and returning the number only as a positive value.
- Ath – a function that acts on a number and returns only the inverse tangent of the number in radians.

The function tree displays the function name as well as the type of variables, appearing in parentheses next to the function name, on which the function acts. For example: DateTime acts on two values, the first is the date, and the second is time, and this function is displayed in the functions tree as: DateTime (date, time).

In order to add a function to the editing area, click the desired function using the left mouse button, the function name appears in the editing area according to the fashion in which it operates.

In order to add a field to the editing area, point to the field name and drag it to the editing area.

A short explanation is available that explains the manner of operation for each function. To view these explanations, point to the function name, and click the left mouse button.

4.6 Using Filters

Filter fields may be of a number of types:

- **Text** – enables you to input an entire string of characters for precise or close search.
- **Numeric field** – enables you to input digits only
- **Date/time** – enables you to select relevant date/time using a calendar
- **Integrated box** – enables you to select a single value
- **List of values** – enables you to select single value of several values from the list

The system manager can define each of the filter field in the following manner:

- Single value – this filter may only be used once
- Several values – this filter may be used without limit with different values
- Value range- several value ranges may be selected to filter a particular field by defining the lower and upper level in each value range
- Additional filter fields can be added by clicking the icon (to the right of the relevant filter).

Furthermore, filter fields can be cancelled and erased using the icon (right of the relevant filter)

To input a text value, type the relevant words/characters in the text box. A filter field with four options is located to the left of the text box.

1. **Begins with**: only a record beginning with the words/characters entered into the text box are included in the report results.
2. **Ends in**: only a record ending with the words/characters entered into the text box are included in the report results.

3. Every record that includes the words/characters entered into the text box are included in the report results.
4. Equal to: records identical to the words/characters entered into the text box are included in the report results.

To enter a date/time type value, click the calendar icon to the left of the filter field ( ) or the filter field itself. A calendar window opens that enables you to select a date and time.

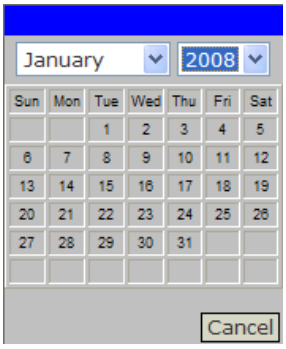


Figure 9 Calendar Filter

After a date is selected, the calendar closes and the date and time values appear in the filter field.

To enter a value/several values from a list, click the list icon left of the filter field ( ) or the filter field itself. A window with a list appears from which values can be selected.

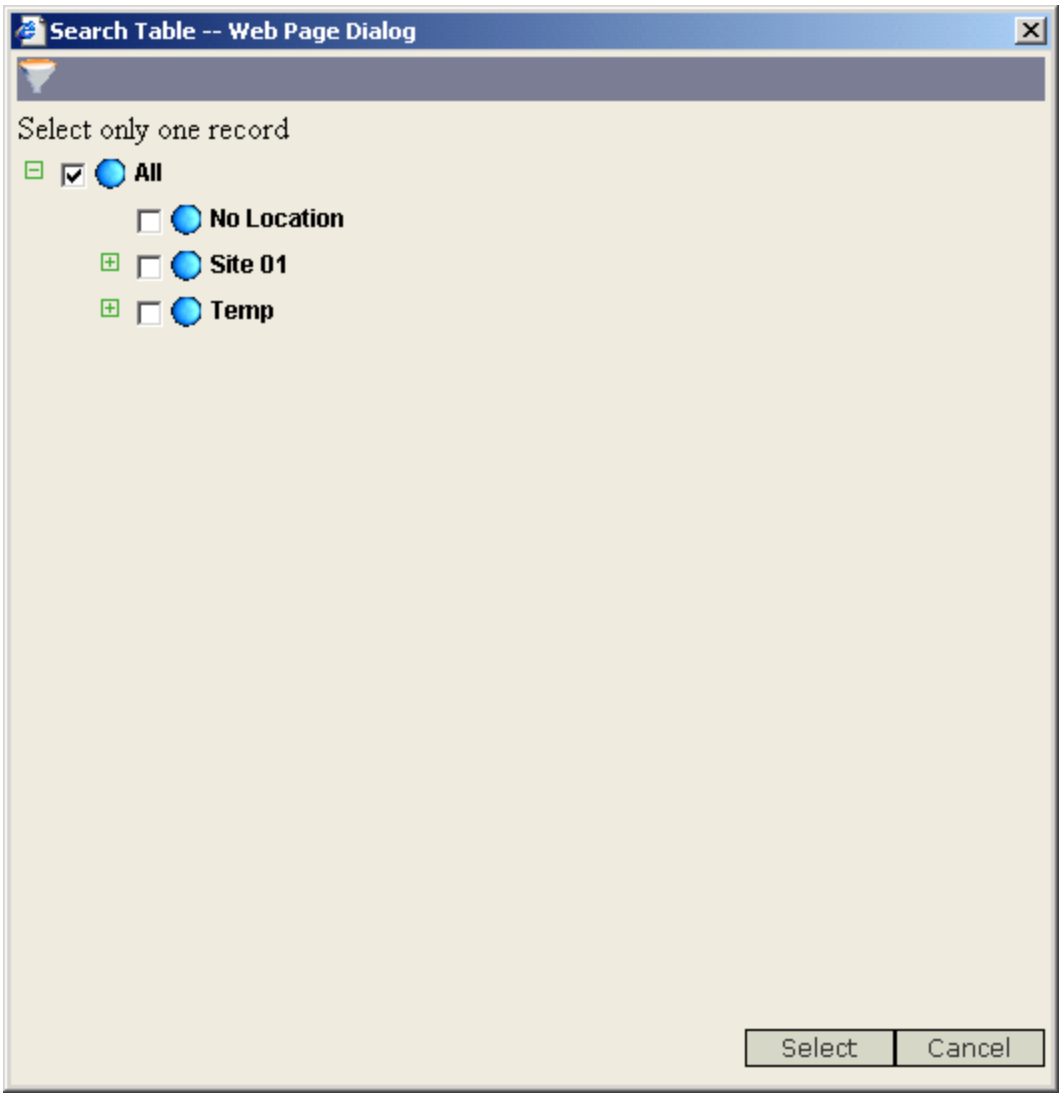


Figure 10 Filter Screen With List Of Values

If only one value is selected from the list, a notification message appears at the top of the table. If not, an unlimited number of values may be selected.

To select a value from the list, highlight the checkbox right of the relevant record. After selecting the values, click **select**. The window closes and the selected values appears on the filter field.

A toolbar with additional search options is located above the value table.

- **Skip pages** – on the left of the toolbar is a combined box that enables you to viewi the number of pages in the table and moving from page to page (every page displays a maximum of 15 values determined by the system manager).
- **Filter**- clickes the filter value to search for a specific value in one of the table columns.

  To delete Filter values, click the eraser icon at the left of the filter field ( ).

Report sorting fields – if the system manager defined sorting fields in the report settings screen, another item can be added, displaying the sorting fields determined and the required sorting order – ascending or descending. click the plus sign "+" at the right of the field to select the field again. A different sorting order may be selected for each field.

Figure 11 Report Sorting Fields

4.7 Generating the Report and Advanced Properties

After report updates are updated (saving is not mandatory), it can be generated. To generate, click the magnifying glass icon on the toolbar ( )

At the head of the page is a toolbar with the following advanced options (from right to left):

- Generate report
- Save as – creates a new user report from an existing report
- Save – saves updated settings to existing user report
- Export report data – to Excel, Word, PDF format etc. (according to the properties of the customer's Crystal version)
- E-mails report
- Schedules report
- Print report

Chapters 6 to 12 provide a detailed description of the advanced options.

Chapter 5 - View and Navigate Report Data

After a report is produced by Report Center, the following report screen is displayed:

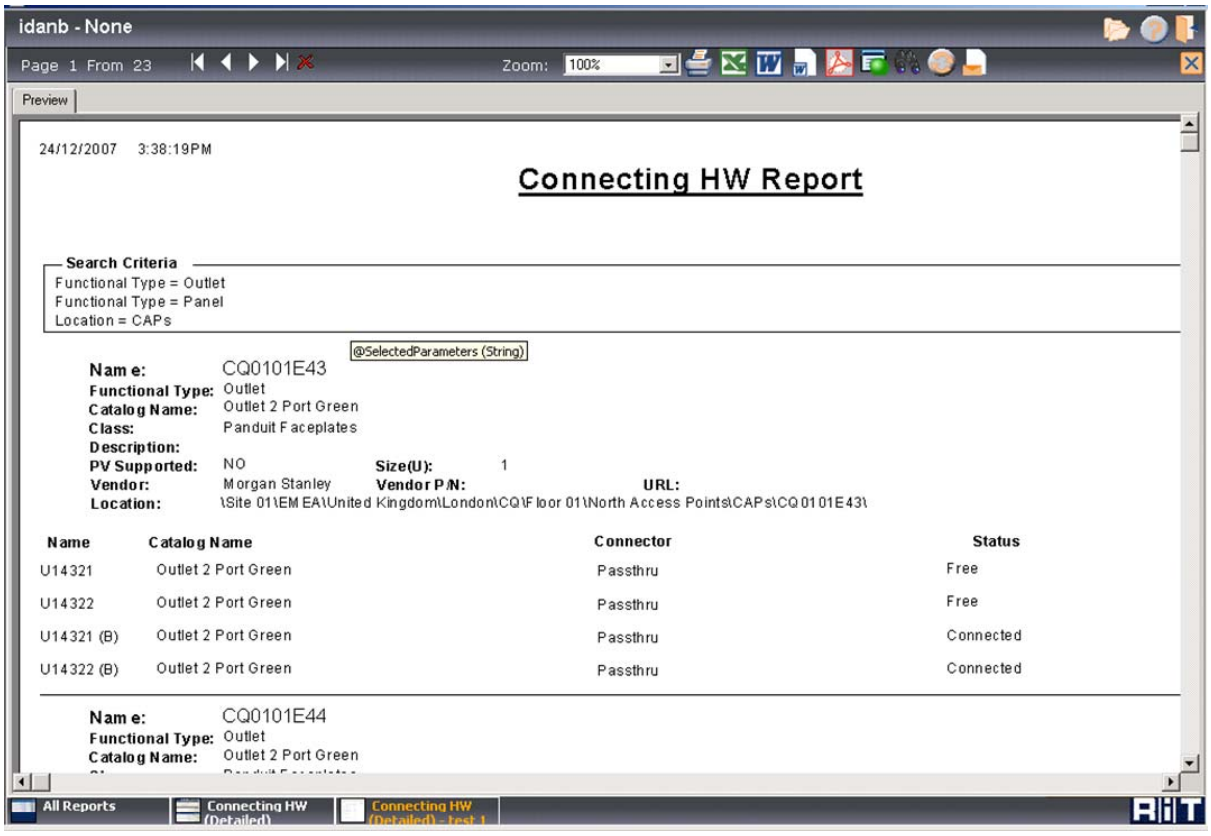


Figure 12 Report Screen

The report screen is divided into three major parts:

1. Report settings – report headers, report generator's name and filters selected for report.
2. Report data – the body of the report.
3. Navigate through report data and perform advanced actions – using the toolbar.

At the top of the report is the report generator name as well as filter values selected for each of the highlighted fields.

A toolbar at the top of the page presents the following options (from right to left):

- Report **page numbering**
- Skip **report pages** – next page, previous page, first page, last page
- Distance **from display** – enlarge/diminish report display
- Print **report**

- Export **report data** to Excel, Word, PDF format etc.
- **Search** ( ) opens a window that enables you to search for information within the report. You must enter the requested data. Click **find next**. The data is presented and is highlighted in orange. Repeated clicking on this button will continue the search for the data further on in the report and so on until the end of the report.

Figure 13 Report Search Screen

- Refresh report data – renewed production of report
- E-mail report – immediate or scheduled mailing

Chapter 6 - Save Report

After selecting a particular report from Report Center, the following report settings screen is displayed.

Figure 14 Report Settings Screen

The toolbar on the report settings screen provides two options for saving the reports:

1. **Save as** – creates a new user report from an existing report
2. **Save** – saves updated settings to existing user report

6.1 Create New User Report from Existing System / User Report

New personal reports may be created from existing system/user reports.

After selecting a particular report, you can update report headers and filter values. To permanently save these settings in a new user report, you must click **save as** ( ) on the toolbar.

The system prompts you to feed the *report description* field again, as follows.

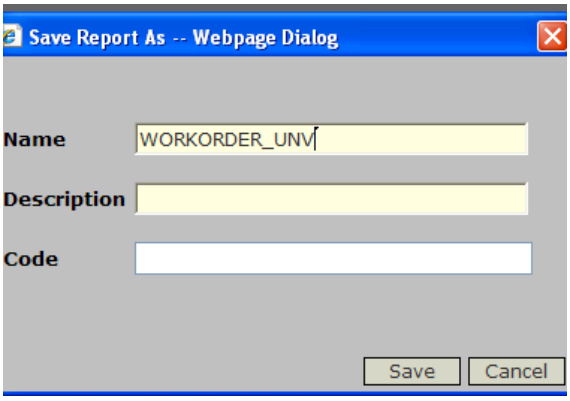


Figure 15 Save As screen

If the new report was saved successfully, the new user report is added to the system and the message *report save succeeded* appears.

The new user report may be accessed in the *My Reports* sub-directory within the Personal Reports directory.

6.2 Save Updated Settings to Existing User Report

Updated settings may only be saved to user-type existing reports. System report settings may not be updated.

After selecting a particular user report, you can update report headers and filter values. To permanently save these settings in a new user report, you must click **save** ( ) on the toolbar. If the update is successful, the system displays the message *report save succeeded*.

If you update the system report settings and attempt to save them, the system provides the option to save a new user report with these settings. The system displays the *Save As* screen and prompts you to input the new Report Description field. If the new user report was saved successfully, the new user report is added to the system and the message *report save succeeded* appears.

Chapter 7 - Delete Report

After logging into the system (*Chapter 2*), the following main Report Center screen is displayed:

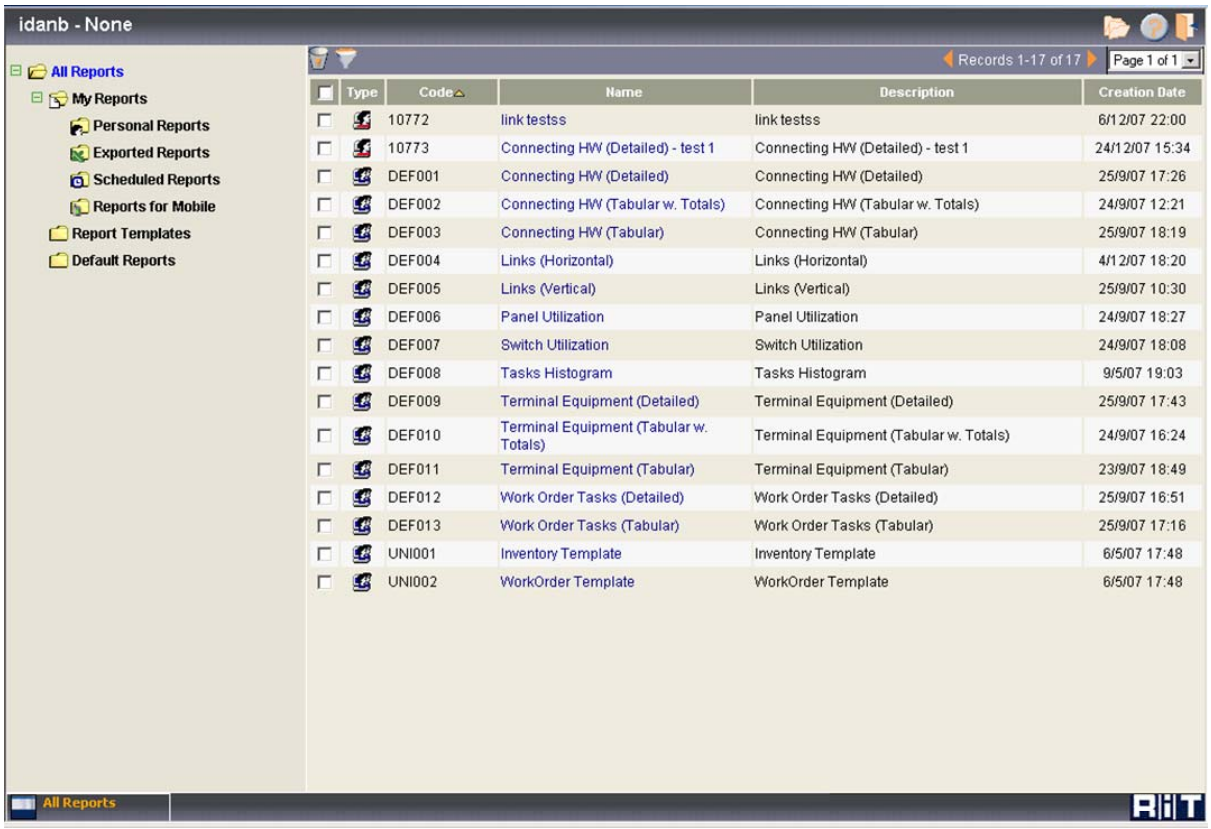

idanb - None
All Reports
My Reports
Personal Reports
Exported Reports
Scheduled Reports
Reports for Mobile
Report Templates
Default Reports
Records 1-17 of 17
Page 1 of 1
Type
Code
Name
Description
Creation Date
10772 link testss link testss 6/12/07 22:00
10773 Connecting HW (Detailed) - test 1 Connecting HW (Detailed) - test 1 24/12/07 15:34
DEF001 Connecting HW (Detailed) Connecting HW (Detailed) 25/9/07 17:26
DEF002 Connecting HW (Tabular w. Totals) Connecting HW (Tabular w. Totals) 24/9/07 12:21
DEF003 Connecting HW (Tabular) Connecting HW (Tabular) 25/9/07 18:19
DEF004 Links (Horizontal) Links (Horizontal) 4/12/07 18:20
DEF005 Links (Vertical) Links (Vertical) 25/9/07 10:30
DEF006 Panel Utilization Panel Utilization 24/9/07 18:27
DEF007 Switch Utilization Switch Utilization 24/9/07 18:08
DEF008 Tasks Histogram Tasks Histogram 9/5/07 19:03
DEF009 Terminal Equipment (Detailed) Terminal Equipment (Detailed) 25/9/07 17:43
DEF010 Terminal Equipment (Tabular w. Totals) Terminal Equipment (Tabular w. Totals) 24/9/07 16:24
DEF011 Terminal Equipment (Tabular) Terminal Equipment (Tabular) 23/9/07 18:49
DEF012 Work Order Tasks (Detailed) Work Order Tasks (Detailed) 25/9/07 16:51
DEF013 Work Order Tasks (Tabular) Work Order Tasks (Tabular) 25/9/07 17:16
UNI001 Inventory Template Inventory Template 6/5/07 17:48
UNI002 WorkOrder Template WorkOrder Template 6/5/07 17:48
All Reports
RiT

Figure 16 Main System Screen

A list of the selected reports in the present directory are displayed in the center of the screen. To delete a report, mark the checkbox to the left.

After checking the reports to be deleted, click the *Delete Report* icon ( ) on the toolbar. The system prompts you for final approval for this request and then deletes the requested reports.

Note, only user reports in *My Reports* directory can be deleted. System reports cannot be deleted.

Chapter 8 - Export Report Data

Report data can be exported to various file formats using the toolbar at the top of the Report Settings screen and the report screen.

The exportable formats are determined by the properties of the Crystal version used by the customer. Popular current formats include: Excel, Word, RTF, PDF, HTML.

After you click the icon for a particular format, the system immediately begins the exporting process. The resulting file may be viewed in the selected format or downloaded into the Exported Reports sub-directory within *My Reports* directory.

Chapter 9 - Print Report

To print the report, click the Print icon on the toolbar at the top of the Report Settings screen and the report screen. The print screen is displayed.

After selecting the Enterprise Printer option, Report Center performs a quick print on the enterprise printer (recommended for enterprise users printing a large number of pages).

If Local Print is selected, the user's computer prints the report on a printer directly connected to it.

Chapter 10 - E-mail Report

IMPORTANT NOTE!

*When sending a report via email, the sender's email account details **must** be defined in the PV4E software.*

A report can be emailed by clicking the email Report icon ( ) on the toolbar at the top of the Report Settings screen and the report screen. The email report screen is displayed below.

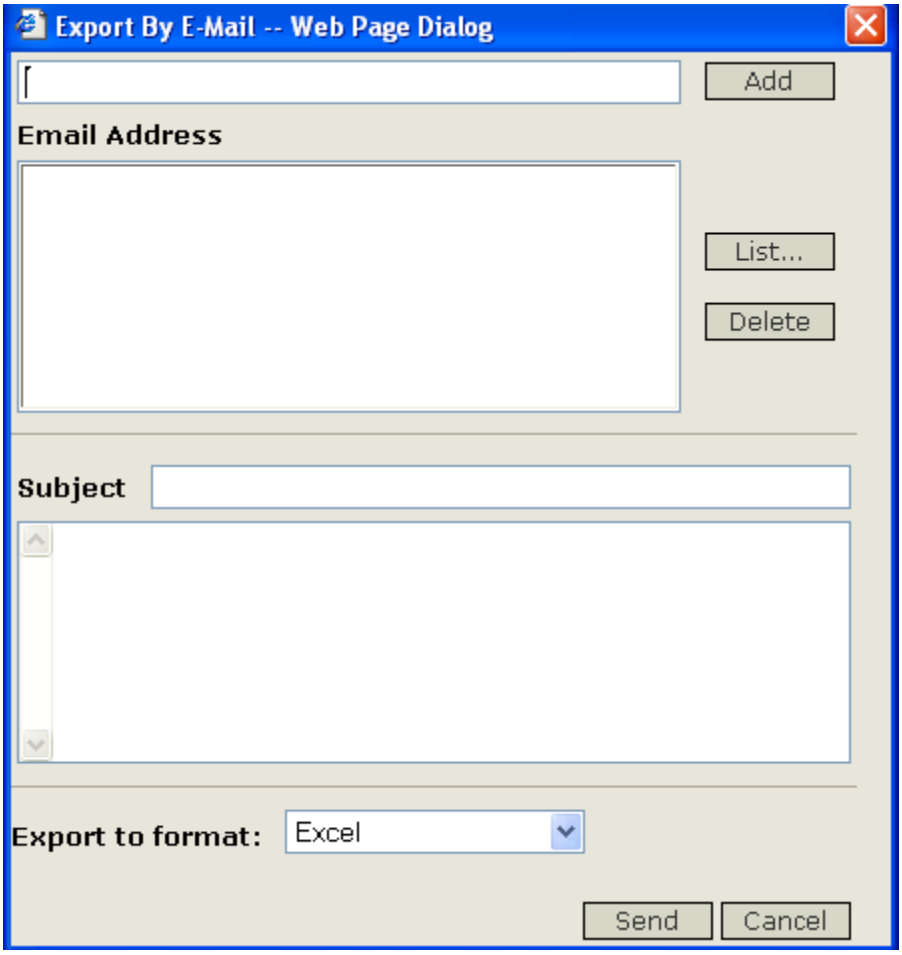


Figure 17 E-mail Report Screen

At the top of the screen, the email addresses can be selected from a list that includes all users in the Report Center. Email addresses may also be entered manually and added to the list of addressees by clicking the *add* button. The requested file format can then be selected from the Export to Format field.

Chapter 11 - Periodic Report Scheduling and Activating Warnings

Reports can be periodically scheduled and warnings can be set by clicking the scheduling and warning icon ( ) on the toolbar at the top of the Report Details screen.

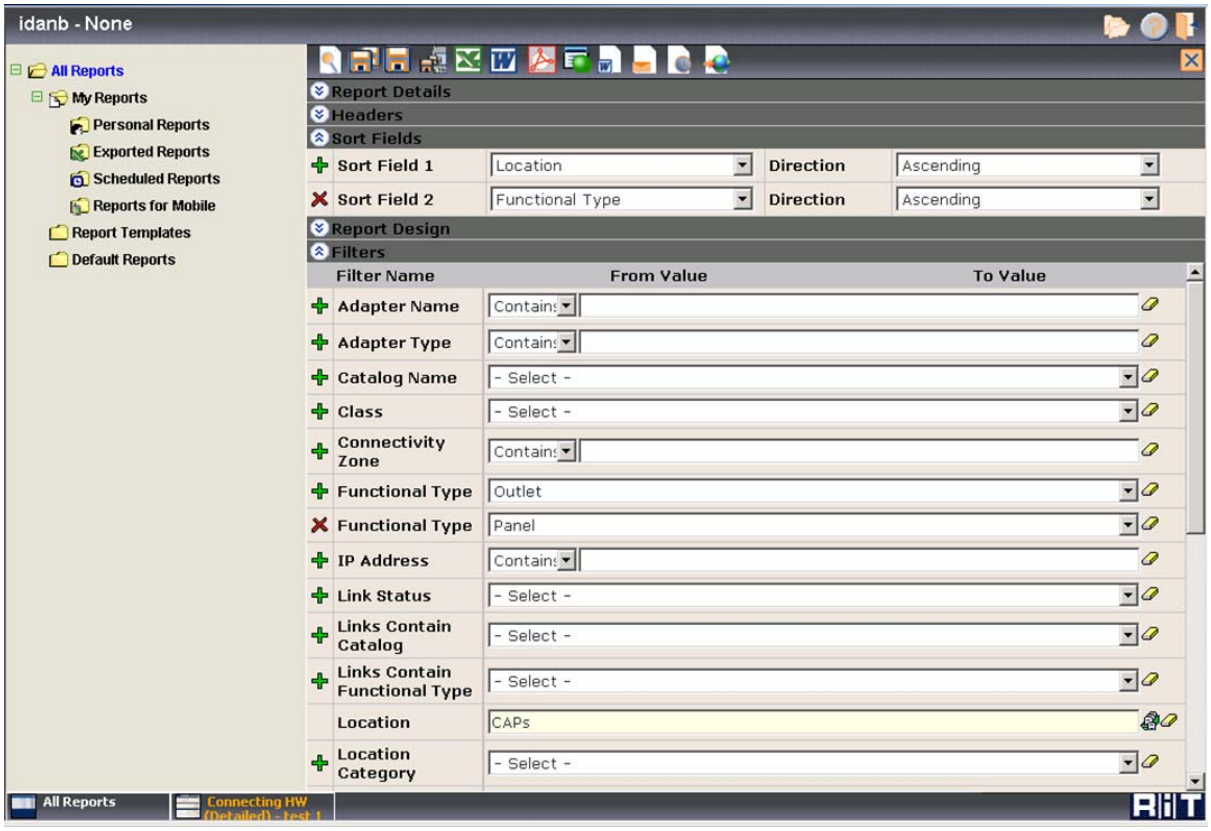


Figure 18 Report Details Screen

Click the *schedule* and *warning* icon to open a window where you can define periodic scheduling or warnings.

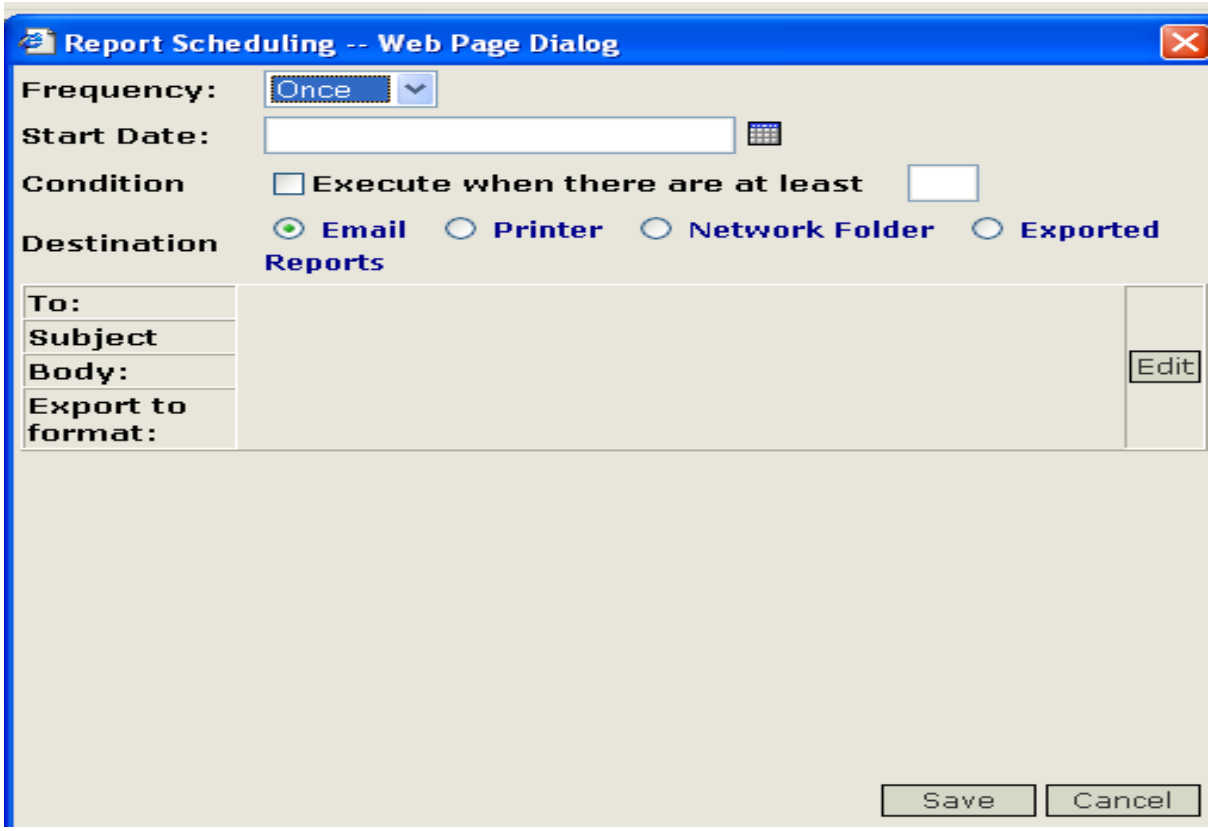


Figure 19 Setting Design Window

11.1 Periodic Scheduling Setting

- **Warning frequency** – determines the frequency in which the report is sent
- **Operation begin date** – this box contains a calendar to which the user may set the relevant date and precise time for the report arrival
- **Operation conditions** – If you check this box, you will be required to enter a number to schedule the report. The number of records must be equal or greater than the requested number.
- **Destination** – You can select the way that the form is delivered. For example, through a network directory, by e-mail, printer or Exported Reports directory.

If you select the printer option, the enterprise printer name must be approved and listed as an option.

The entire report or selected pages can be printed.

To finish, click **OK**.

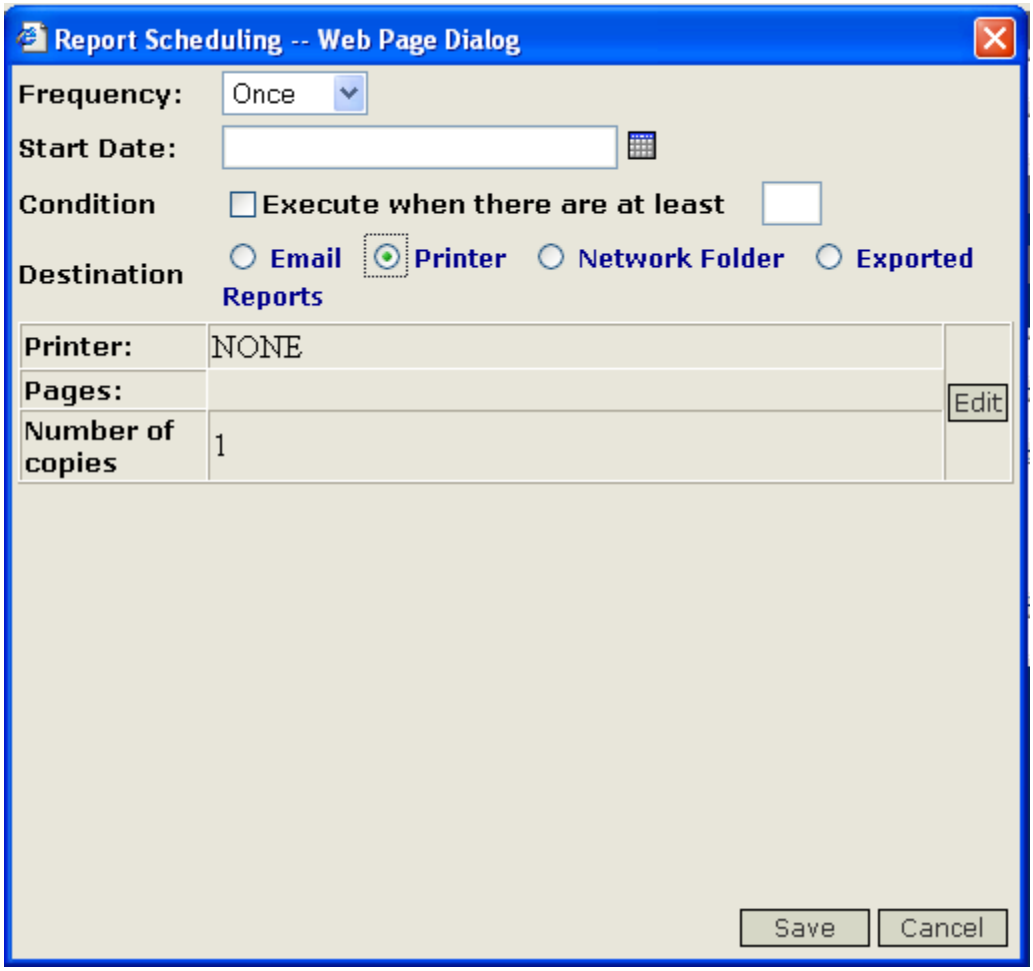


Figure 20 Receive Report Through Printer Option

If you want to receive the report through a network directory, the type of format and directory path for the report must be selected.

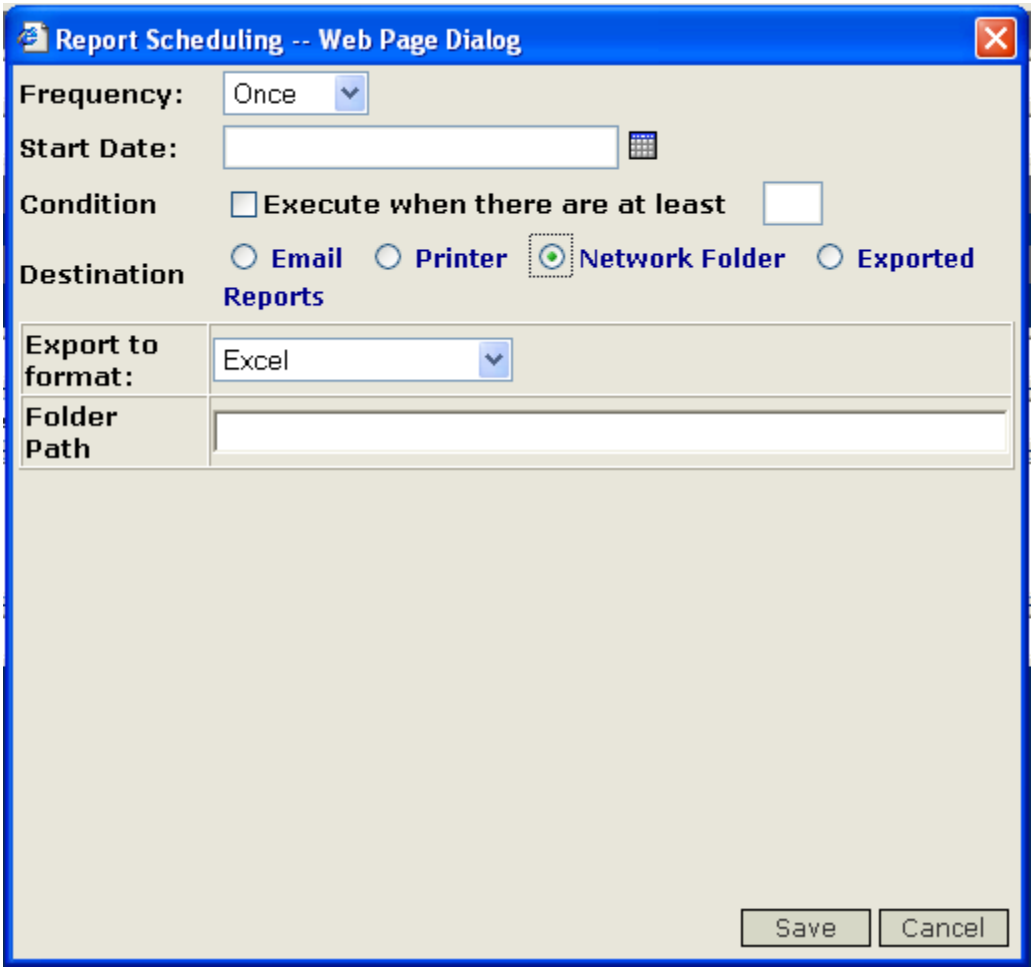


Figure 21 Receive Report Through Network Directory Option

If you want to export a report by email you must enter the relevant e-mail addresse(s) in the window. You can enter a new address or select one that is already in the user's address book.

Enter the subject of the report on the subect line, you can write the contents of the report in the box beneath.

To complete the action select the report export format.

Click **OK** and **save**.

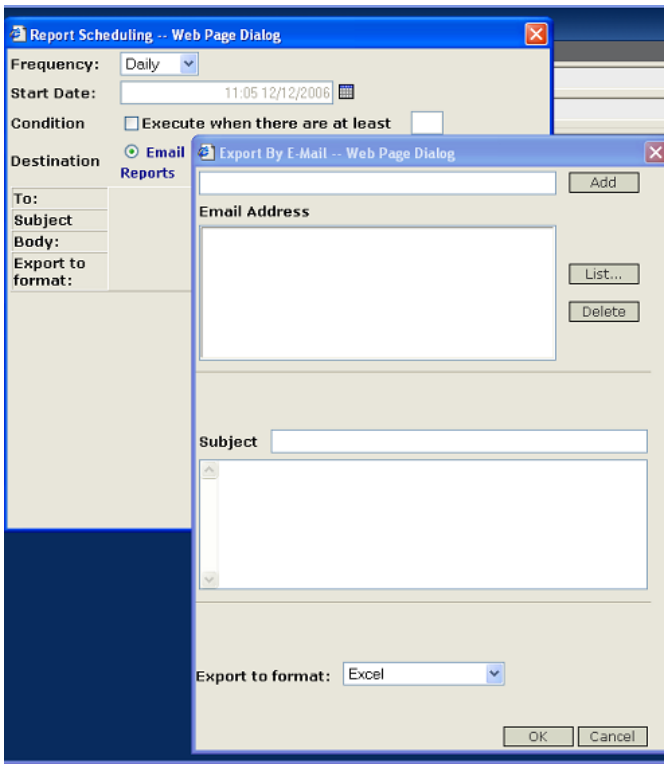


Figure 22 Receive Report By E-Mail Option

If you select the exported reports option you must select the report export format.

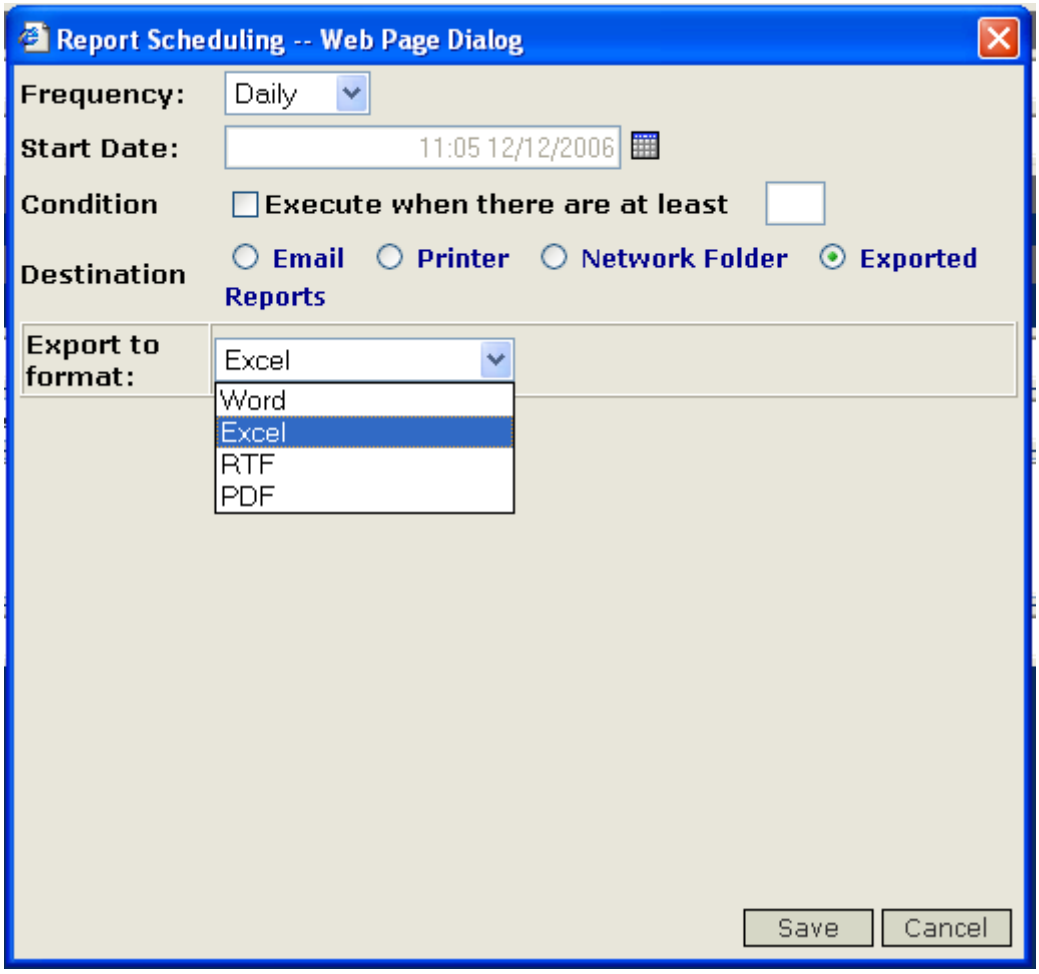


Figure 23 Receive Report Through Exported Reports Option

11.2 Report Warning Settings

The settings screen includes a report warning option, activated by checking the *perform only if number of records is at least* box . This refers to activating a condition that sends the report to the user only if it is fulfilled.

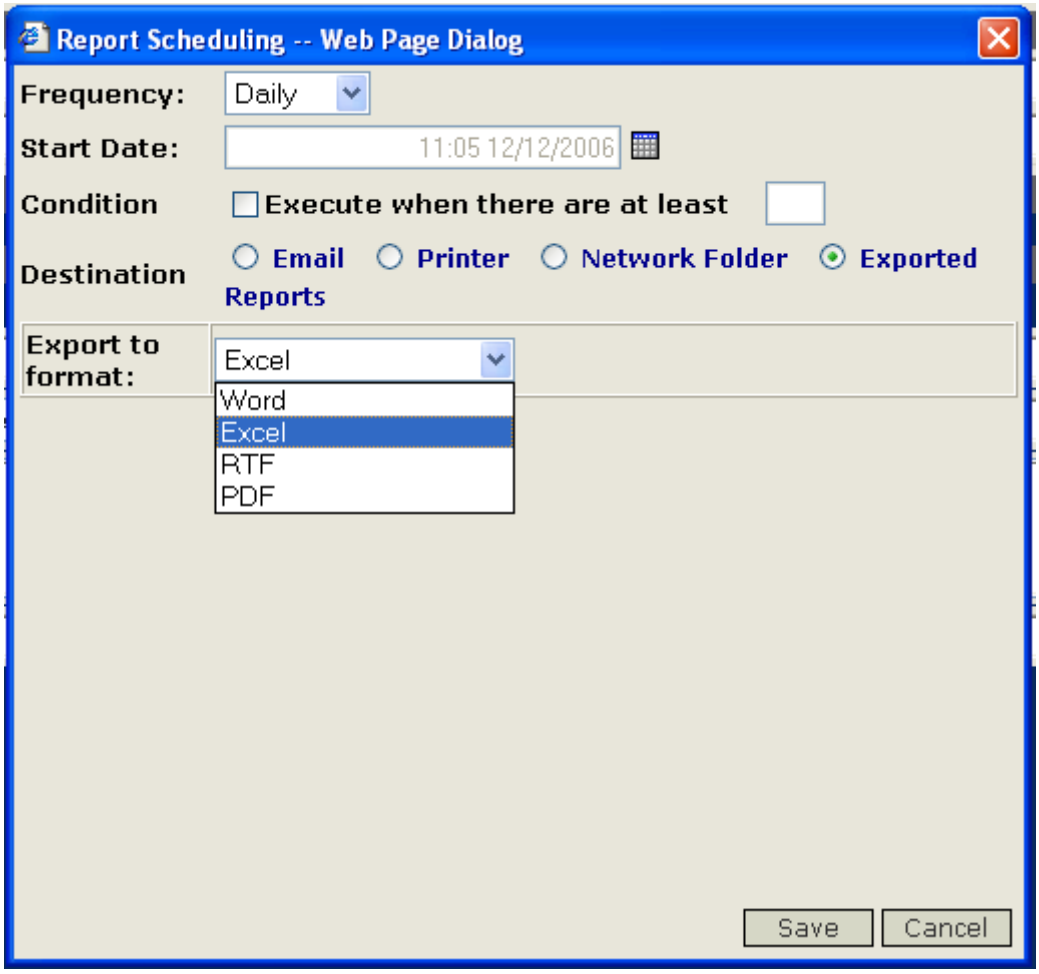


Figure 24 Operate Warning Box

Complete the following boxes according to the above. See *Periodic scheduling setting*.

Chapter 12 - Mapped Fields

Mapped fields are PV4E database fields that are mapped into the reporting module to allow you to create reports.

There are two main report templates in the report center:

- Inventory template – allows you to create a report on every item and link stored in the PV4E database.
- Work Order template – allows you to create report for Work Orders created in PV4E.

Each template includes its own mapped fields which correlate to the PV4E database fields.

Inventory Template

The inventory template contains several logical databases. Each database has its own fields as follows:

- Devices – every item stored in PV4E.
- Adapters – any type of adapter that can be installed in a Terminal Equipment such as NIC, SCSI, etc.
- Ports – any port in PV4E, such as switch port, panel from and back port, outlet ports, etc.
- Connectivity Zone – connectivity zones as defined in PV4E. Connectivity Zones are a group of panels which are used by the automated provisioning module
- Links – any part of link between switch, panel, outlet, etc.

Note:

Link information is updated periodically.

When executing a report it displays link information updated since last update was performed.

You can however initiate an update manually.

Devices

Filed Name	Description	Type	Can be Filtered
Catalog Name	The catalog name of devices	String	Yes
Class	The Class to which devices belong in the catalog	String	Yes
CPU	The CPU speed of the terminal equipment	Float	No
Description	Description of the device, taken from the	String	No

Filed Name	Description	Type	Can be Filtered
	'Notes' field in the device properties window		
Device Name	The name of the device	String	Yes
Functional Type	The functional type to which the device belongs. Functional type is a list of options, such as: panel, outlet, switch, master, etc.	String	Yes
Location	Location of the device	String	Yes
Location Category	The Location category of the device location. Using this field you can filter devices by their location, for example: generate a report only for devices that are located in a rack, switch, city, etc.	String	Yes
Monitor	The type of monitor that is connected to the terminal equipment	String	No
Network Equipment Type	The network equipment type name. For switch this field display either module or chassis	String	No
No. of Slots	The number of available slots in the device. This field displays the number of modules for a switch. And displays the number of slots for adapters for fields.	Integer	No
PV Supported	Managed or non-managed panels.	Yes/No	Yes
PVMax Parent Name	The name of the parent device to which a PVMax device is connected in a PVMax topology tree. Available only for PVMax devices	string	Yes
PVMax Parent Port	The port number to which the device is connected to in the parent device. Available only for PVMax devices	integer	No
PVMax Parent Type	The type of the PVMax parent device to which a device is connected in a PVMax topology tree. Applicable types can be Expander, Master, etc. Available only for PVMax devices	string	Yes
PVMax Serial	The serial number of the PVMax device.	string	No

Filed Name	Description	Type	Can be Filtered
Number	Available only for PVMax devices		
PVMax Software	The software information of the PVMax device. Available only for PVMax devices	string	Yes
PVMax Status	PVMax device status. Available only for PVMax devices	string	Yes
Rack Indicator Name	When the device is a rack, this field contains the name of the rack indicator that is associated with it	String	Yes
RAM	The amount of RAM in the terminal equipment	Float	No
Reserved (RACK)	This field relates to a RACK and indicates if the RACK space is free or reserved for a server/etc.	Yes/No (may be null)	Yes
Serial No.	The serial number of the device	String	No
Size (U)	The size of the device in U units	Float	No
Vendor	The name of the vendor	String	Yes
Vendor URL	Vendor's website	String	No

Adapters

Filed Name	Description	Type	Can be Filtered
Adapter Name	The name of the adapter	String	Yes
Adapter Ports Number	The number of ports in the adapter	Integer	No
Adapter Slot	The slot number in the device where the adapter is installed	Integer	No
Adapter Type	The type of the adapter, adapter can be: NIC, Modem, SCSI, etc.	String	Yes

Ports

Filed Name	Description	Type	Can be Filtered
Connector	The type of the connector	String	No
IP Address	The IP Address of the port. This is relevant if the port belongs to terminal equipment, such as a station with NIC installed on the port, IP phone, etc.	String	Yes
Link status	Whether this port is part of full link. See Appendix A: Link Status, applicable options	String	Yes
MAC Address	The MAC Address of the port. This is relevant if the port belongs to terminal equipment, such as station with NIC installed on that port, IP phone, etc.	String	Yes
Port ID	The name of the port in the inventory	String	Yes
Port Index	The index of the port in the device	Integer	No
Port Name	The name of the port in the catalog	String	No
Port Type	The type of the port. Whether Back or Front.	String	Yes
Subnet	The subnet of the port. This is relevant if the port belongs to terminal equipment, such as station with NIC installed on that port, IP phone, etc.	String	Yes
Subnet Mask	The subnet mask of the port. This is relevant in case the port belongs to terminal equipment, such as station with NIC installed on that port, IP phone, etc.	String	No

Connectivity Zone

Field Name	Description	Type	Can be Filtered
Conn. Zone Desc.	The description of the Connectivity Zone which is used by the automated provisioning module	String	No
Connectivity Zone	The name of the Connectivity Zone which is used by the automated provisioning module	String	Yes

Links

Field Name	Description	Type	Can be Filtered
Link ID	The internal DB ID of the link. All the ports that belong to this link should have the same link ID value.	String	No
Link Order	The order in which items appear in a link	Integer	No
Link Update Time	The last time that the link information was updated.	Date time	Yes

Work Order Template

Filed Name	Description	Type	Can be Filtered
Assigned To	The user that needs to perform the task	String	Yes
Closed By	The name of the user that closed the Work Order	String	Yes
Closed Date	The date that the Work Order was closed	Date time	Yes
Created By	The name of the user that created the Work Order	String	Yes
Creation Date	The date that the Work Order was created	Date time	Yes
Description	A description of the Work Order	String	No
Due date	The due date of the Work Order	Date time	Yes
ID	The ID of the Work Order	String	Yes
Location A	The first location of the task	String	Yes
Location B	The second location of the task	String	Yes
Priority	The priority of the Work Order	Integer	Yes
Status	The status of the Work Order	String	Yes
Task Description	The description of the task. The description is a text describing briefly the task that needs to be performed.	String	No
Task Due date	The task's due date	Date time	Yes

Filed Name	Description	Type	Can be Filtered
Task Number	The task number	Integer	Yes
Task Status	The status of the task	String	Yes
Task Type	The type of the task	String	Yes

Chapter 13 - Filters

About Filters

Filters allow you to control which type of information is displayed in a report. You can set filters to display only relevant information in your report.

There are two main report templates in the report center:

- Inventory template – allows you to create reports that include every item and link stored in the PV4E database.
- Work Order template – allows you to create reports for Work Orders in PV4E.

Each template includes its own filters.

Filter Types

There are several types of filters:

- Text – allows you to filter by entering free text. Using the 'contains' drop-down allows filtering by any part of the field text: 'start with', 'end with', 'contains', 'equal to'.
- List – filters of this type include a list of options to choose from. The list can include information taken from the database, such as 'Catalog name' or it can include a predefined list, such as 'port type'.
- Boolean filter –Yes/No
- Date – allows you to filter by choosing date, range of dates or use predefined date filters such as: yesterday, current month, last month, Etc.

Basic Filter Skills

Use the following when working with filters:

Icon	Used when…
	Choosing from a list
	Adding a filter item
	Removing a filter item
	Clearing the filter selection
	Copying date to next field

Filters in Inventory Template

Filter Name	Description	Type	Comments
Adapter Name	There are several types of adapters in PV4E, for example: NIC, Modem, etc. This filter allows you to filter adapters by name.	Text	
Adapter Type	Filter adapters by type, e.g. NIC, KVM…	Text	
Catalog Name	Filters for specific items according to their catalog name. This filter list contains all catalog names as they appear in PV4E.	List	
Class	Filters devices by class name. This filter list contains all class names as they appear in PV4E.	List	
Connectivity Zone	Filters devices, links… by the connectivity zone to which they belong	Text	
Device Name	Filters device by name.	Text	
Functional Type	Filters devices by functional type, e.g. Panel, Switch…	List	
IP Address	Filters devices by IP address or any part of it.	Text	
Link Status	Filters ports that are part of a certain type of link: full link, incomplete link, etc. see Appendix A: Link Status, Applicable Options	List	
Link Update Time	Filters for links according to their last update time	Date or list	
Link Contain Catalog	Filters only links that contain a specific catalog item	List	
Links Contain Functional type	Filters only links that contain specific items according to their functional type	List	
Location	Filter for items which are located in certain location	List	
Location Category	Filters items which are located in certain types of locations, e.g. search for all items located in a Rack.	List	
MAC Address	Filters terminal equipment from a full or partial MAC address	Text	
Port ID	Filters ports by ID	Text	
Port Type	Filters back or front panel's ports	Text	
PV Supported	Filters managed or non managed items	Yes/No	

Filter Name	Description	Type	Comments
PVMAX Parent Type	Filters PVMax devices by their parent PVMax device	List	
PVMAX Status	Filters active or non active PVMax devices	List	
Rack Indicator Name	Filters Rack Indicator device by name.	Text	
Reserved (RACK)	Filters for new, reserved or free Rack spaces	Yes/No	
Show Devices	Filters terminal equipment that is part of a link 'with links' or 'without links'. Terminal Equipment is considered part of a link if it has a port which is connected.	List	
Subnet	Filters devices by network subnet	Text	
Vendor	Filters devices by vendor	List	

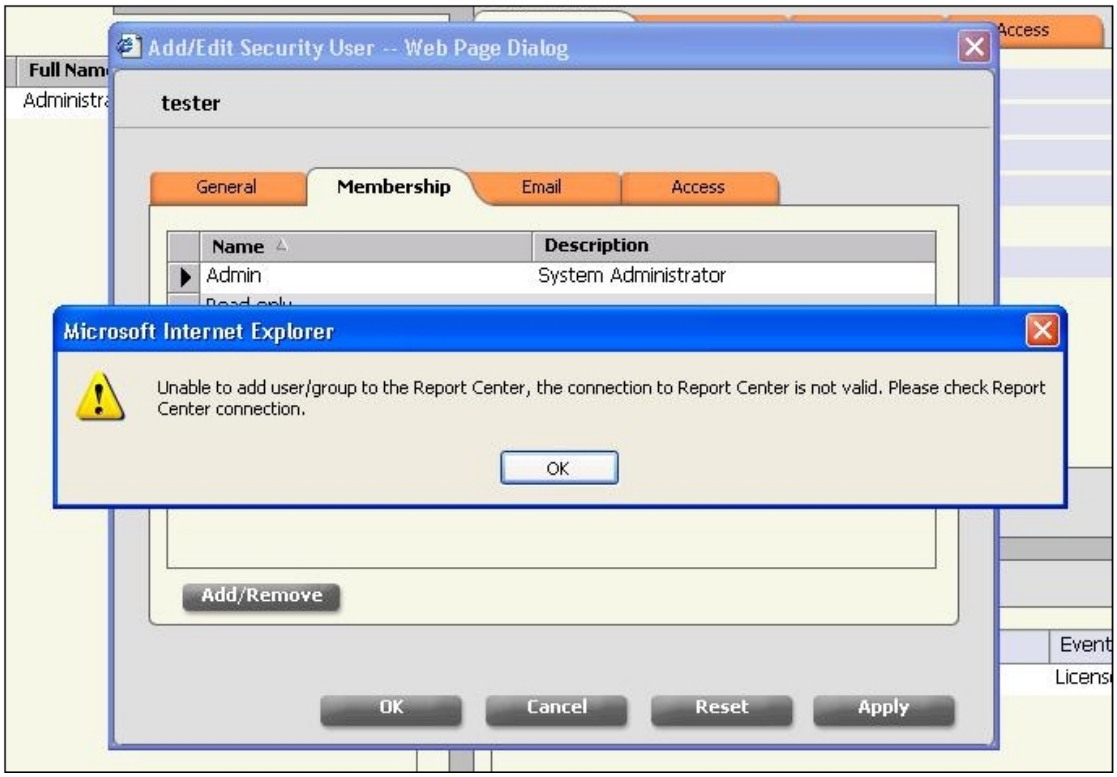
Filters in Work Order Template

Filter Name	Description	Type	Comments
Assigned to	Filters the name of the person the Work Order(s) is assigned to	List	The list includes all the users in the system
Closed By	Filters the name of the person who closed the Work Order(s)	List	The list includes all the users in the system
Closed Date	Filters Work Orders by closing date	Date	
Created By	Filters the name of the person who created the Work Order(s)	List	The list includes all the users in the system
Creation Date	Filters Work Orders by creation date	Date	
Due Date	Filters Work Orders by due date	Date	
Priority	Filters Work Orders by priority	List	List of priorities as appears in PV4E database.
Status	Filters Work Orders by status	List	
Task number	Filters Work Order tasks by number	Text	
Task Status	Filters Work Order tasks by status	List	
Task Type	Filters Work Order tasks by type	List	
WO ID	Filters Work Orders by any part of its ID	Text	

Chapter 14 – Troubleshooting

User Privileges Error

If you receive the following error message when granting user privileges to access the Report Center, it could be due to the setup being run from the CD/DVD. To correct, copy the contents of the installation disk to your hard drive and run the setup again,



Appendix B: Link Status, Applicable Options

Definition

"Full Link" – set of links between outlet and a switch port, including all panels in between.

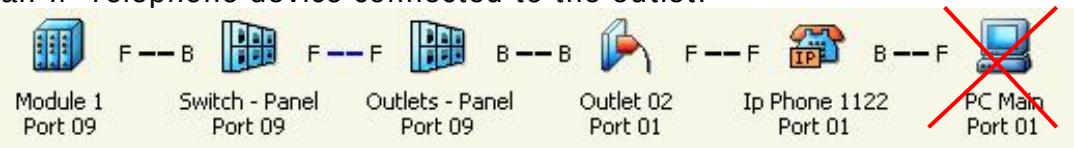
"Extension port" – extension port is a port on an IP Telephone device that enables connecting another PC to the network.

Applicable options for link status are:

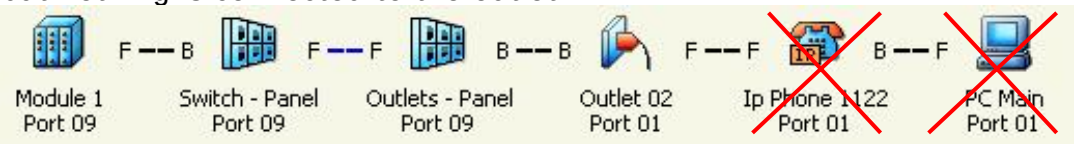
- Full Link with Terminal Equipment
  - Example: a PC that is connected to an outlet and to a panel and to a switch.

F B F F B B F F B F
Module 1 Port 09
Switch - Panel Port 09
Outlets - Panel Port 09
Outlet 02 Port 01
Ip Phone 1122 Port 01
PC Main Port 01

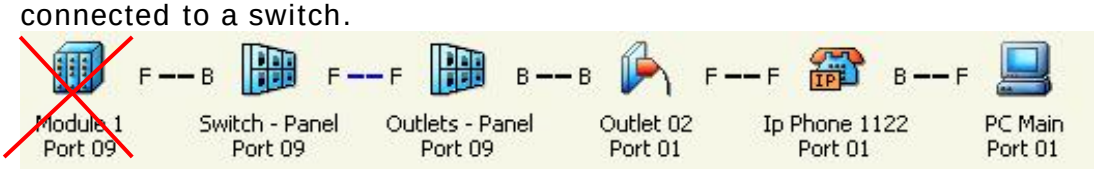
- Full Link without Terminal Equipment and free Extension port
  - Example: a switch that is connected to a panel and to an outlet with an IP Telephone device connected to the outlet.


F B F F B B F F B F
Module 1 Port 09
Switch - Panel Port 09
Outlets - Panel Port 09
Outlet 02 Port 01
Ip Phone 1122 Port 01
PC Main Port 01

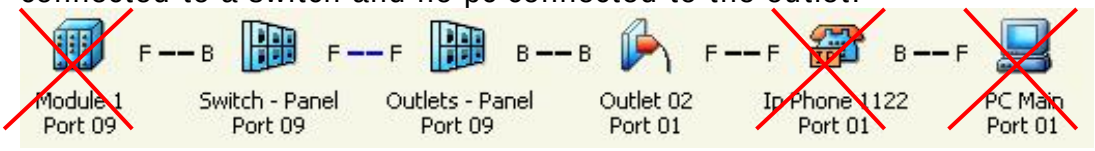
- Full Link without Terminal Equipment
  - Example: a switch port that is connected to a panel and to an outlet but nothing is connected to the outlet.


F B F F B B F F B F
Module 1 Port 09
Switch - Panel Port 09
Outlets - Panel Port 09
Outlet 02 Port 01
Ip Phone 1122 Port 01
PC Main Port 01

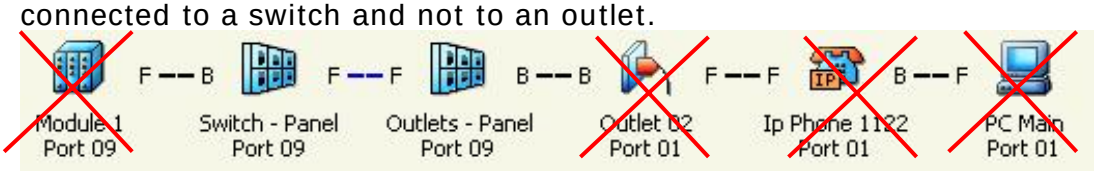
- Full Link with Terminal Equipment and free Extension port
  - For future use
- Terminal Equipment without a full link
  - Example: a PC that is connected to outlet and to a panel but is not connected to a switch.


F B F F B B F F B F
Module 1 Port 09
Switch - Panel Port 09
Outlets - Panel Port 09
Outlet 02 Port 01
Ip Phone 1122 Port 01
PC Main Port 01

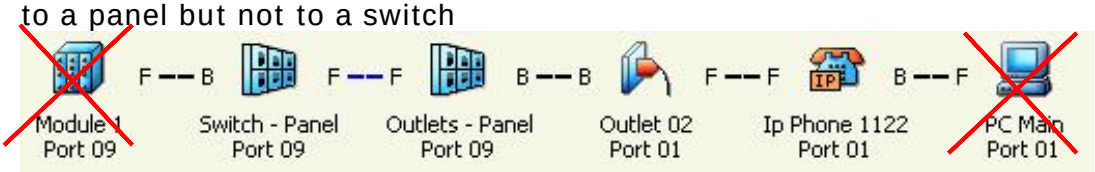
- Incomplete full link without Terminal Equipment
  - Example: patch cord connected between two panels but not connected to a switch and no pc connected to the outlet.



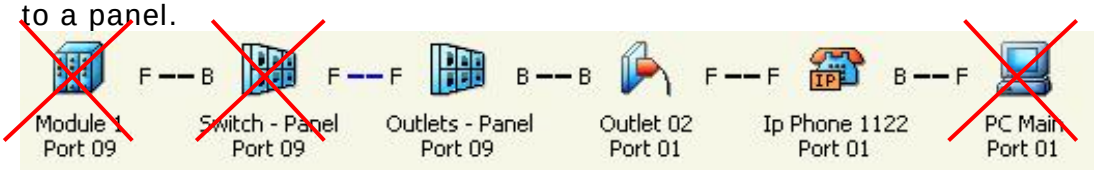
  - Example: patch cord connected between two panels but not connected to a switch and not to an outlet.



- Incomplete full link Without Terminal Equipment and free Extension port
  - Example: Example: IP Telephone device connected to an outlet and to a panel but not to a switch



  Example: Example: IP Telephone device connected to an outlet and to a panel.



- Incomplete full link With Terminal Equipment and free Extension port
  - For future use.

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